NMRI

THE IMPACT OF INFLATION AND ENERGY CONSERVATION ON CONSUMER SHOPPING HABITS and A GENERAL MERCHANDISE SHOPPING UPDATE

by
NATIONAL MASS RETAILING INSTITUTE

with sponsorship and assistance from
DuPont Company Consumer Products

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NMRI

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President

9TH NMRI/DUPONT STUDY

THE IMPACT OF INFLATION AND ENERGY CONSERVATION ON CONSUMER SHOPPING HABITS and A GENERAL MERCHANDISE SHOPPING UPDATE

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NATIONAL MASS RETAILING INSTITUTE

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TABLE OF CONTENTS

	Page Number
INTRODUCTION	1
METHODOLOGY	2
MANAGEMENT SUMMARY	4
DETAILS	16

I N T R O D U C T I O N

What effect has continuing inflation and the need to conserve energy had upon the shopping habits and attitudes of general merchandise shoppers? This was the lead-off probe in the ninth NMRI/DuPont Study conducted in February of this year.

The answers reveal that your customers see themselves shopping less, buying less, more quality/price value conscious, and doing more comparison shopping on a price and quality basis.

The value of this 1981 Study is further enhanced by the fact that it represents an update of pertinent information from two previous NMRI/DuPont Studies: the 1972 Study, Personal Activities and Related Purchases of Self-Service General Merchandise Shoppers, and, the 1973 Study, Where Shoppers Buy General Merchandise in Competitive Areas and What Prompts Their Decisions.

In the pages of this 1981 Study, you will find invaluable information such as, why general merchandise customers shop certain store types and not others, how they react to the advertising of various store types, how they rate the different store types on seven key marketing factors, where they purchase home project type items and automotive maintenance needs.

Our industry is again indebted to the DuPont Company for sponsorship of another fine, highly relevant study. This study joins the previous eight NMRI/DuPont studies to represent a library of valuable data readily at hand to assist you in achieving maximum success in the conduct of your business.

NMRI also recognizes the contribution made by Ralph Head & Affiliates, Ltd. in the professionalism and competence of conducting and reporting this as well as all previous NMRI/DuPont studies.

New York
April 1981

Richard I. Hersh, President
National Mass Retailing Institute

FOREWORD

This year's NMRI/DuPont Study was designed with two objectives in mind. One was to satisfy the requests of several NMRI members for an update of data developed in earlier studies. The areas of greatest interest centered around key merchandising factors such as advertising, comparison shopping, coupon usage and a relative competitive ranking from consumers.

The second objective was to determine what, if any, impact ever increasing inflation and the need to conserve energy has had on the American consumers' shopping habits. Since this study was designed, the inflation rate and the cost of energy have both hit an all-time high which make this second study objective all the more timely.

METHODOLOGY

The methodology used for this study is the same as that used in the 1978 Shopper Study. Consumers were interviewed in four geographically dispersed trading areas within the U.S. The four market areas were selected to provide a high degree of competitive activity and also to be as representative as possible of the general population.

The actual consumer interviews were conducted in key shopping malls located within each geographic area. Malls were selected as the interview points because of their ever growing importance on the retailing scene. By interviewing mall customers, it is possible to determine how many of them are also discount store customers and how they view discount stores.

The actual locations, which were the same as the 1978 Study, were selected to provide at least two different discount stores within a five mile radius of the mall. All of the other retail types probed were also adequately represented within the five mile radius.

The other store types include regular full line department stores, private label general merchandise stores (identified as PLGM in this report), home centers and chain drug stores.

The four trading areas selected for this study are identified in this report as Northeast, Southeast, Midwest and Far West.

A total of 325 interviews were conducted in each trading area resulting in a total study sample of 1,300 interviews. The interviews were conducted during February of 1981.

The pages which follow present the results of this year's consumer study. Also presented are selected results from previous consumer studies. The reader should bear in mind that different methodologies were used in some of the previous studies and that the comparisons presented are offered for general information and not necessarily as absolute industry or consumer trends.

James C. Head

James C. Head, President
Ralph Head & Affiliates, Ltd.

MANAGEMENT SUMMARY

The following summarizes the highlights of this 1981 General Merchandise Shoppers Study. Comparisons are made between the results of this study and two previous studies (1972 and 1973 NMRI/DuPont) wherever comparable data was compiled. The page numbers to the right of each highlight indicate where the complete details will be found.

CHANGING SHOPPING HABITS

- 76% of all shoppers interviewed said rising prices had caused them to change their shopping habits for non-food products.

  32% said they are buying less.
  19% said they are shopping less often.
  19% are buying more sale items.
  13% are buying essentials only.
  11% are doing more comparison shopping.

  Page 16

- 58% of the respondents said the need to conserve energy has also caused them to make a change in their shopping habits.

  40% combine shopping to make fewer trips.
  21% are shopping less often.
  15% shop closer to home.
  12% shop more in one place.

  Note: In the 1973 NMRI/DuPont Study only 39% said their shopping habits had changed over the previous two years.

  Page 16

- 95% of the respondents said they definitely will or probably will take one or more specific actions in their non-food shopping within the next six months as a result of rising prices.

  93% said they will check more closely for quality/price relationship.
  92% will do more comparison shopping for quality.
  90% will do more comparison shopping for price.
  81% will shop the ads more.

Page 18

- 85% of the respondents said they definitely will or probably will take one or more specific actions within the next six months as a result of the need to conserve energy.

  84% will plan shopping trips to make more than one stop.
  83% will shop closer to home.
  70% will shop less often.

  Note: The responses to specific actions to be taken within the next six months were essentially the same in all four regions studied.

Page 21

COMPARISON SHOPPING

- 89% of the respondents said they now do some comparison shopping for specific items. (Only 77% said they comparison shopped in the 1973 Study.)

  91% comparison shop for quality. (72% in 1973)
  87% comparison shop for price. (68% in 1973)

Page 23

- 35% of the respondents said they now comparison shop for quality in purchasing apparel and accessories.

  12% for shoes.
  10% for appliances.
  8% for housewares and furniture.

  Page 23

- 33% now comparison shop for price in purchasing apparel and accessories.

  11% for shoes.
  11% for appliances.
  7% for housewares and furniture.

  Page 23

COUPON USAGE

- 58% of the respondents said they use coupons that appear in a store's print advertising for general merchandise items. (In 1973, 44% reported using such coupons.)

  78% of the coupon users say they are "clipping" more than they did two years ago.

  Page 24

- 54% of the coupon users say they like the concept.

  24% don't like them, but use them anyway.
  22% have no opinion regarding coupons.

  Almost half (48%) of those who don't like coupons say they are too much trouble.

  Page 24

STORE TYPES SHOPPED AND FREQUENCY

- 86% of all respondents shop in discount stores.

  85% shop in private label general merchandise outlets.
  76% shop in department stores.
  61% shop chain drug outlets.
  55% shop home improvement centers.

Page 27

CHAIN DRUG STORES HAVE THE HIGHEST FREQUENCY OF STORE VISIT FOLLOWED BY THE DISCOUNT STORES

	FREQUENCY OF VISIT			
Store Type	Weekly or More Often	Every 2 Weeks	Every 3-4 Weeks	Every 5-8 Weeks
Chain Drug	32%	20%	27%	11%
Discount	20	18	29	12
Department	16	17	32	13
PLGM*	16	20	32	11
Home Center	8	13	30	15

* Private Label General Merchandise

Page 25

75% OF THE DISCOUNT STORE SHOPPERS SAY THEY ARE SHOPPING DISCOUNT STORES MORE OFTEN OR AT THE SAME RATE AS THEY WERE TWO YEARS AGO. THIS COMPARES TO 54% IN 1973.

	CHANGES IN SHOPPING FREQUENCY (VS. 2 YEARS)					
	More Often		Same		Less Often	
Store Type	1981	1973	1981	1973	1981	1973
Discount	27%	32%	48%	22%	25%	46%
Home Center	23	20	51	29	26	51
PLGM	20	26	54	27	26	47
Department	18	24	48	26	34	50
Chain Drug	26	NA	55	NA	19	NA

Page 26

REASONS FOR SHOPPING SPECIAL STORE TYPES

- 34% of the respondents who shop at discount stores said price was the main reason they shop there.

  17% said sales.
  15% said location/convenience.
  12% named specific product categories.
  7% selection/variety.
  3% quality.

Page 28

- 23% of the respondents who shop at department stores said quality was the main reason they shop there.

  13% said location/convenience.
  13% said selection/variety.
  12% named specific product categories.
  8% sales.

Page 28

- 23% of the respondents who shop at home centers said carry needed items was the main reason they shop there.

  20% said selection/variety.
  16% named specific product categories.
  15% said location/convenience.
  11% said price.

Page 28

- 22% of the respondents shopping at private label general merchandise stores named specific product categories as the main reason for shopping there.

  12% said quality.
  12% said price.
  10% said credit.
  8% selection/variety.

Page 28

- 26% of the respondents who shop at chain drug stores said location/convenience was the main reason they shop there.

  15% said price.
  15% named specific product categories.
  14% said sales.

Page 28

REASONS FOR NOT SHOPPING GIVEN STORES

- 52% of the respondents who do not shop at home centers said no need for items sold was the main reason they don't shop there.

  23% said inconvenience/location.

Page 29

- 60% of the respondents who do not shop at department stores said high prices was the main reason they don't shop there.

  11% said inconvenience/location.

Page 29

- 39% of the respondents who do not shop at chain drug stores said inconvenience/location was the main reason they don't shop there.

  15% said no need.
  10% said they prefer to purchase items at other types of outlets.

Page 29

- 35% of the respondents who do not shop at discount stores said inconvenience/location was the main reason they don't shop there.

  20% said poor quality.
  12% said no need.

Page 29

- 23% of the respondents who do not shop private label general merchandise stores said inconvenience/ location was the main reason they don't shop there.

  15% said high prices.
  12% said poor quality.

Page 29

USAGE OF AND ATTITUDES TOWARD ADVERTISING MEDIA AND RETAIL ADVERTISING

NEWSPAPERS CONTINUE TO BE THE LEADING SOURCE FOR RETAIL ADVERTISING

Media Type	READING FREQUENCY					
	Regularly		Occasionally		Seldom/Never	
	1981	1973	1981	1973	1981	1973
Newspaper	54%	68%	24%	21%	10%	0%
Home Delivered Circular	43	51	25	23	17	22
Catalog	33	33	26	29	17	26
Magazine	32	28	23	35	21	29
In-Store Circular	29	18	29	26	23	44

Page 30

- 72% of all respondents feel that non-food retail advertising gives them the information they need to make a buying decision.

  Of those who feel the information is inadequate-

  35% want a more realistic product description.
  22% want more reliable information.
  10% want a better description of the quality.

Page 31

- 33% of the respondents said they like department store advertising best.

  25% said discount store.
  19% said private label general merchandise store.
  4% specialty store.
  3% chain drug store.
  2% home center.

  Note: In the 1973 Study, 28% like department store advertising best, 21% discount, 18% PLGM, 2% specialty, 2% chain drug.

  Page 32

- 25% of those with an opinion like discount store advertising least.

  8% department store.
  8% private label general merchandise store.
  6% specialty store.
  6% chain drug store.
  6% home center.

  Note: In the 1973 Study, 29% like discount store advertising least, 7% department, 4% PLGM, 4% specialty, 2% home center.

  Page 33

The reasons for liking and disliking the advertising will be found on the pages indicated above.

ADVERTISING IMPACT

- 85% of all respondents said they could recall one or more ads that prompted them to go to the store to purchase the item advertised.

  55% of these respondents named a discount store's advertising.
  42% named a department store.
  38% named a private label general merchandise store.
  27% named a specialty store.

  Note: In the 1973 Study, 68% named a discount store, 41% department, 36% PLGM, 27% specialty.

  Page 34

- 86% of the respondents who went to a store to buy an advertised item completed their purchase plans.

  In 1973, 79% completed their purchase plans.

Page 34

- 45% of those not purchasing in a discount store said the item was out-of-stock.

  15% said poor quality.

Page 35

A complete list of reasons and comparison to other store types will be found on the pages indicated above.

QUALITATIVE RATINGS ON SPECIFIC MARKETING FACTORS

The respondents were asked to evaluate the five store types by rating each of them with regard to seven specific marketing factors on an excellent to poor basis. Weighting assigned: excellent (5 points), very good (4), good (3), fair (2), poor (1).

WEIGHTED INDEX RATINGS FOR ALL FOUR REGIONS BY STORE TYPE

Factor	Discount	Dept.	PLGM	Home Center	Chain Drug
Pricing	270	231	295	203	231
Quality	240	380	337	248	247
Employee Helpfulness	197	292	289	203	217
Variety of Merchandise	281	347	344	275	247
Selection of Merchandise	262	337	333	253	246
Advertising	263	330	326	239	240
Store Location	276	356	343	255	280

Page 35

Compared with ratings achieved in the 1973 Study for the same seven marketing factors, in the 1981 Study-

Discount stores showed an increase in rating points for all marketing factors except store location.

Home Centers showed an increase in rating points for all marketing factors except pricing.

Department stores showed a decrease in rating points for all factors except advertising.

PLGM stores showed a decrease in rating points for all factors except advertising.

Chain Drug stores were not in the 1973 Study.

The complete results and comparisons with the 1973 Study will be found starting on page 35.

HOME DO-IT-YOURSELF PROJECTS

- 78% of the home owners and home renters among respondents said they do one or more home maintenance or home decorating jobs around the home.

Project	1981 Study	1973 Study
Painting	78%	76%
Carpentry	55	47
Wallpapering	51	32
Plumbing	49	49
Cement Work	37	28
Electrical Work	36	39

Page 37

ABOUT THOSE WHO PAINT

- 38% of those who do painting purchase the majority of their paint in specialty stores, primarily for quality.

  30% in PLGMs, primarily for quality.
  17% in discount stores, primarily for price.
  15% in home centers, primarily for price.

Page 38

- 61% of those who do painting said they paint both exterior and interior.

  38% said interior only.

  57% generally purchase a national brand for exterior painting.

  52% purchase a national brand for interior painting.

Page 39

- 50% of the respondents who paint said they "always" or "most of the time" wait for paint to go on sale before purchasing.

  22% seldom wait.
  28% never wait.

Page 39

- 78% usually purchase paint accessories such as brushes, rollers, thinning agents, drop cloths at the same store in which they purchase their paint.

Page 39

PURCHASING FOR OTHER HOME PROJECTS

- 58% of those who do carpentry work purchase the majority of their needs at a home center, primarily because of price and location.

Page 40

- 71% of those who wallpaper make the majority of their purchases in specialty stores, primarily for price and variety.

Page 41

- 50% of those who do plumbing jobs purchase the majority of their needs at home centers, primarily because of location.

Page 42

- 50% of those who do cement work make the majority of their purchases at home centers, primarily because of location.

Page 42

- 49% of those who do electrical work make the majority of their purchases at home centers, primarily because of location.

Page 43

AUTOMOTIVE MAINTENANCE

- 90% of the respondents have a family member who performs some kind of maintenance on their automobile.

AUTOMOTIVE MAINTENANCE PERFORMED

Job They Do	1981 Study	1973 Study
Washing	85%	93%
Change Oil	82	70
Add/Change Anti-freeze	80	76
Wax/Polish	79	82
Minor Mechanical Repairs	73	74
Engine Tuneup	50	59
Lubrication	49	44
Add Oil Additives	42	*
Add Gas Additives	41	*
Major Mechanical Repairs	29	NA

* In 1972, these two categories were combined. The combined result was 54%. In 1978, the combined total was 51%.

Page 43

- 51% of the respondents who have some member of the family doing car maintenance said the majority of their maintenance needs are purchased in a specialty store, primarily for price and location.

  30% purchase in discount stores, primarily for price.
  11% in PLGM, primarily for quality.
  6% in home centers, primarily for price.

Page 44

DETAILS

Changes in Shopping Habits 1981 Study Vs. 1973 Study

*1973 Study

Question: Do you feel your shopping habits have changed over the past two years?

	Total	N E	M W	F W	S E
Yes	39%	36%	38%	49%	32%
No	61	64	62	51	68
	100%	100%	100%	100%	100%

1981 Study

Question: Has the continuing problem of rising prices and the ever growing need to conserve energy caused any changes in your snopping habits?

Rising Prices

	Total	N E	M W	F W	S E
Yes	76%	76%	79%	77%	75%
No	24	24	21	23	25
	100%	100%	100%	100%	100%

Energy

	Total	N E	M W	F W	S E
Yes	58%	58%	58%	52%	64%
No	42	42	42	48	36
	100%	100%	100%	100%	100%

* From NMRI/DuPont Report Where Shoppers Buy General Merchandise in Competitive Areas and What Prompts Their Decisions

Question: What changes has the continuing problem of rising prices caused in your shopping habits?

Changes	Total	N E	M W	F W	S E
Buy Less	32%	33%	38%	33%	23%
Shop Less	19	16	21	21	16
Buy Sales Items	19	20	26	14	18
Buy Essentials Only	13	21	13	13	9
More Comparison Shopping	11	11	14	14	11
Buy Lower Priced Brands	7	8	7	7	5
Switch to Discount Stores	4	1	2	2	12
Use More Coupons	3	2	3	3	8
Go Without	3	5	5	5	1
More Quality Conscious	3	4	3	3	3
Buy Fewer Clothes	3	7	3	3	-
	*	*	*	*	*

Question: How have you changed your shopping habits because of the ever growing need to conserve energy?

Changes	Total	N E	M W	F W	S E
Combine Shopping Make Fewer Trips	40%	42%	48%	35%	33%
Shop Less Often	21	27	18	25	15
Shop Closer to Home	15	18	15	18	10
Shop More in One Place	12	5	7	10	23
Plan Better	5	1	9	3	6
Car Pool	4	3	5	1	5
Walk	3	5	2	2	1
Use Public Transportation	2	-	1	2	5
No Answer	4	1	5	6	3
	*	*	*	*	*

* Totals more than 100% due to multiple answers

Question: From this list indicate whether you definitely will, probably will, probably will not or definitely will not take each of the actions listed within the next six months as a result of rising prices.

National Response

Action	Definitely Will	Probably Will	Probably Will Not	Definitely Will Not
Comparison Shop for Quality	63%	29%	7%	1%
Comparison Shop for Price	62	28	7	3
Check for Quality-Price Relationship	61	32	6	1
Be More Selective in the Quality of Non-Food Products	59	32	7	2
Shop the Ads More	52	29	13	6
Use More Cents-Off Coupons	46	24	18	12
Spend Less on My Non-Food Budget	35	37	22	6
Use More Manufacturers' Rebates	31	28	29	12
Buy More Store Brands	28	38	26	8
Buy Lower Priced Brands	26	30	32	12
Buy More National Brands	12	43	39	6

Regional Response

Action	Definitely Will	Probably Will	Probably Will Not	Definitely Will Not
Comparison Shop for Quality				
N E	64%	29%	5%	2%
M W	64	28	7	1
F W	58	30	10	2
S E	68	27	4	1
Comparison Shop for Price				
N E	61%	27%	8%	4%
M W	63	29	6	2
F W	58	29	10	3
S E	65	28	5	2
Check for Quality-Price Relationship				
N E	63%	30%	5%	2%
M W	62	31	6	1
F W	55	34	9	2
S E	64	30	5	1
Be More Selective in the Quality of Non-Food Products				
N E	61%	32%	5%	2%
M W	64	29	5	2
F W	55	33	10	2
S E	58	35	5	2
Shop the Ads More				
N E	55%	26%	11%	8%
M W	54	32	11	3
F W	40	32	18	10
S E	57	26	11	6
Use More Cents-Off Coupons				
N E	55%	26%	11%	8%
M W	54	32	11	3
F W	40	32	18	10
S E	57	26	11	6

Regional Response

Action	Definitely Will	Probably Will	Probably Will Not	Definitely Will Not
Spend Less on My Non-Food Budget				
N E	40%	30%	23%	7%
M W	33	37	25	5
F W	34	39	21	6
S E	30	41	23	6
Use More Manufacturers' Rebates				
N E	39%	21%	25%	15%
M W	30	34	31	5
F W	28	28	30	14
S E	26	30	30	14
Buy More Store Brands				
N E	28%	36%	24%	12%
M W	24	43	28	5
F W	33	35	24	8
S E	26	38	29	7
Buy Lower Priced Brands				
N E	25%	27%	30%	18%
M W	24	30	36	10
F W	30	30	30	10
S E	24	32	34	10
Buy More National Brands				
N E	16%	45%	33%	6%
M W	8	41	48	3
F W	14	38	40	8
S E	11	48	36	5

Question: From this list indicate if you definitely will, probably will, probably will not or definitely will not take each of the actions within the next six months as a result of the need to conserve energy.

National Response

Action	Definitely Will	Probably Will	Probably Will Not	Definitely Will Not
Plan Shopping Trips to Make More than One Stop	59%	25%	12%	4%
Shop Closer to Home	49	34	15	4
Shop Less Often	38	32	23	7
Shop Closer to Work	27	26	25	22
Car Pool Shopping Trips	9	11	33	47

Regional Response

Action	Definitely Will	Probably Will	Probably Will Not	Definitely Will Not
Plan Shopping Trips to Make More than One Stop				
N E	64%	19%	13%	4%
M W	64	24	10	2
F W	50	30	14	6
S E	58	28	12	2
Shop Closer to Home				
N E	54%	27%	16%	3%
M W	47	33	17	3
F W	48	35	14	3
S E	47	37	12	4
Shop Less Often				
N E	42%	28%	21%	9%
M W	40	33	22	5
F W	33	32	26	9
S E	36	36	24	4

Regional Response

Action	Definitely Will	Probably Will	Probably Will Not	Definitely Will Not
Shop Closer to Work				
N E	30%	20%	25%	25%
M W	28	27	29	16
F W	23	28	25	24
S E	28	29	21	22
Car Pool Shopping Trips				
N E	11%	8%	22%	59%
M W	7	13	47	33
F W	10	12	31	47
S E	9	11	33	47

Question: Do you comparison shop for price and/or quality?

Comparison Shop For	Total		1981 Study			
	1981	1973	N E	M W	F W	S E
Price	87%	68%	85%	93%	81%	91%
Quality	91	72	93	95	87	91
Neither	11	23	11	6	16	9

Question: What are three types of items you normally comparison shop for on a price basis and three types of items on a quality basis?

Merchandise Category	Percent All Category Mentions	
	Price	Quality
Apparel/Accessories	33%	35%
Appliances	11	10
Shoes	11	12
Housewares/Furniture	7	8
Household	6	4
HBA	6	5
Hardware/Paint	4	5
Automotive	4	3
Domestic	3	3
22 Other Categories	15	15
	100%	100%

There were no significant variations in the four regions studied.

NOTE: This same question was asked in the 1973 Study. The only significant difference occurred in the Housewares/Furniture category where 25% said they comparison shop for price and 25% also said quality.

Question: Do you ever use coupons for general merchandise items which you have to clip from a store's printed advertisement or circular?

	Total		1981 Study			
	1981	1973	N E	M W	F W	S E
Always	17%	9%	17%	16%	12%	22%
Sometimes	41	35	32	51	38	43
Never	42	56	51	33	50	35
	100%	100%	100%	100%	100%	100%

Question: Is this more than you did two years ago?

	Total				
	1981	N E	M W	F W	S E
Yes	78%	68%	88%	69%	81%
No	22	32	12	31	19
	100%	100%	100%	100%	100%

Question: Do you like these coupons?

	Total		1981 Study			
	1981	1973	N E	M W	F W	S E
Yes	54%	49%	54%	59%	55%	46%
No	24	46	30	8	40	19
No Opinion	22	5	16	33	5	35
	100%	100%	100%	100%	100%	100%

Question: If you don't like coupons, why don't you?

		1981 Study			
Reason	Total	N E	M W	F W	S E
Too Much Trouble	48%	40%	43%	50%	61%
No Interest	15	13	23	16	10
Prefer Lower Prices	12	18	13	8	7
Not Enough Savings	4	2	6	8	1
Other	6	7	11	7	-
Don't See/Receive	15	20	4	11	21
	100%	100%	100%	100%	100%

Shopping Frequency By Store Type

Question: How often do you shop in the following store types? (Department store, Home Center, Discount Department store, Private Label General Merchandise store, Chain Drug store)

	*Chain Drug		Discount		Department		PLGM		Home Center	
	'81	'73	'81	'73	'81	'73	'81	'73	'81	'73
Weekly or More Often	32%	-	20%	22%	16%	20%	16%	18%	8%	8%
Every 2 Weeks	20	-	18	15	17	22	20	22	13	8
3-4 Weeks	27	-	29	25	32	28	32	28	30	23
5-8 Weeks	11	-	12	12	13	9	11	8	15	8
9-12 Weeks	5	-	8	7	7	4	6	5	12	8
13-16 Weeks	1	-	2	3	3	3	3	4	4	5
17-26 Weeks	3	-	7	10	8	9	8	11	14	19
Less Often	1	-	4	6	4	3	4	3	4	20
No Answer	-	-	-	-	-	2	-	1	-	1
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

* Not included in the 1973 Study

Shopping Once a Week or More Often

	Total	1981 Study			
	1981	N E	M W	F W	S E
Chain Drug	32%	26%	40%	26%	30%
Discount	20	17	21	21	20
Department	16	26	11	13	13
PLGM	16	19	18	16	11
Home Center	8	12	7	8	6

Shopping Every Two Weeks or More Often

	Total	1981 Study			
	1981	N E	M W	F W	S E
Chain Drug	52%	39%	57%	44%	55%
Discount	38	33	46	37	37
Department	33	43	29	34	25
PLGM	36	37	41	40	24
Home Center	21	27	19	23	14

Shopping 3 to 4 Weeks or More Often

Chain Drug	79%	72%	82%	68%	86%
Discount	67	61	71	68	69
Department	65	74	64	64	56
PLGM	68	68	71	72	58
Home Center	51	49	45	66	42

Question: Are you shopping these individual store types more or less often than you did two years ago?

Discount

	Total		1981 Study			
Shopping	1981	1973	N E	M W	F W	S E
More Often	27%	32%	19%	25%	20%	41%
The Same	48	22	52	53	41	46
Less Often	25	46	29	22	39	13
	100%	100%	100%	100%	100%	100%

Department

More Often	18%	24%	19%	23%	15%	16%
The Same	48	26	52	48	44	45
Less Often	34	50	29	29	41	39
	100%	100%	100%	100%	100%	100%

Private Label General Merchandise

	Total		1981 Study			
Shopping	1981	1973	N E	M W	F W	S E
More Often	20%	26%	19%	25%	18%	19%
The Same	54	27	58	55	45	58
Less Often	26	47	23	20	37	23
	100%	100%	100%	100%	100%	100%

Home Center

More Often	23%	20%	22%	19%	18%	34%
The Same	51	29	55	59	41	52
Less Often	26	51	23	22	41	14
	100%	100%	100%	100%	100%	100%

*Chain Drug

More Often	26%	-%	23%	22%	21%	35%
The Same	55	-	59	65	44	53
Less Often	19	-	18	13	35	12
	100%		100%	100%	100%	100%

* Not included in the 1973 Study

Percent of All Respondents Who Shop Stores

Store Type	Total	N E	M W	F W	S E
Discount	86%	76%	91%	90%	89%
PLGM	85	88	84	91	77
Department	76	89	75	67	74
Chain Drug	61	20	76	65	84
Home Center	55	63	55	62	40

Why Respondents Shop or Do Not Shop Stores

Question: What is the main reason you shop at each of the stores you shop in?

Reason	Total	Discount	Chain Drug	PLGM	Home Center	Dep't
Price	17%	34%	15%	12%	11%	3%
Named Specific Item	15	12	15	22	16	12
Store Sales	11	17	14	6	6	8
Selection/ Variety	10	7	7	8	20	13
Have Needed Items	9	4	14	6	23	7
Quality	9	3	2	12	-	23
Location	7	8	13	4	7	10
Convenience	7	7	13	6	8	3
Credit	4	1	-	10	-	5
Like Merchandise	4	1	2	7	2	7
Price/Quality	2	3	1	4	-	1
Other	1	1	1	2	-	2
No Particular Reason	4	2	3	1	7	6
	100%	100%	100%	100%	100%	100%

Question: What is the main reason you do not shop in certain stores?

Reason	Total	Home Center	Chain Drug	Discount	PLGM	Dep't
No Need	23%	52%	15%	12%	9%	9%
Location	16	13	27	18	11	4
High Prices	15	5	4	-	15	60
Inconvenient	11	10	12	17	12	7
Not Familiar With Store	10	9	24	7	2	3
Poor Quality	6	2	1	20	12	1
Dislike Store	3	1	-	4	9	3
Prefer Other Type Outlet	3	1	10	-	3	2
Poor Service	2	1	-	2	6	1
Dislike Merchandise	2	1	1	3	9	2
Dislike Specific Category	1	-	-	3	1	-
Poor Housekeeping	1	-	-	3	-	-
No Particular Reason	7	5	6	11	11	8
	100%	100%	100%	100%	100%	100%

Respondents' Usage of and Attitudes Toward Advertising Media and Retail Store Advertising

Question: How often do you read the following types of printed retail store advertising?

	Total		1981 Study			
Read Regularly	1981	1973	N E	M W	F W	S E
Newspapers	54%	68%	68%	64%	48%	35%
Home Delivered Circular	43	51	52	49	49	25
Catalog	33	33	36	42	31	23
Magazines	32	28	36	39	32	18
In-Store Circular	29	18	33	39	25	18
Read Occasionally						
Newspapers	24%	21%	17%	16%	19%	43%
Home Delivered Circular	25	23	18	19	22	40
Catalog	26	29	20	19	26	40
Magazine	23	35	22	17	20	34
In-Store Circular	29	26	31	20	23	41
Read Seldom/Never						
Newspaper	10%	9%	9%	6%	14%	11%
Home Delivered Circular	17	22	15	10	19	21
Catalog	17	26	19	9	20	20
Magazine	21	29	21	14	21	29
In-Store Circular	23	44	24	9	29	30
Don't See/Receive						
Newspaper	12%	2%	6%	14%	19%	11%
Home Delivered Circular	15	4	15	22	10	14
Catalog	15	12	25	30	23	17
Magazine	24	8	21	30	27	19
In-Store Circular	29	12	12	32	23	11

Question: Do you feel that the non-food retail ads you see give you the information about the product advertised that you need to make a buying decision?

	Total		1981 Study			
	1981	1973	N E	M W	F W	S E
Yes	72%	63%	75%	71%	65%	76%
No	27	36	25	29	35	19
No Opinion	1	1	-	-	-	5
	100%	100%	100%	100%	100%	100%

Question: If you want more information, what should it be?

	Total		1981 Study			
	1981	1973	N E	M W	F W	S E
More Realistic Description	35%	18%	38%	36%	31%	35%
More Reliable Information	22	-	30	19	22	15
Must See to Buy	11	28	7	10	7	21
Better Description of Quality	10	16	15	5	9	12
More About Material in Product	8	6	5	13	5	8
Size/Color Available	5	10	-	6	11	-
When Sales End	1	-	-	2	-	-
Other	3	*22	4	3	4	5
No Answer	5	-	1	6	11	4
	100%	100%	100%	100%	100%	100%

*NOTE: In 1973 Study, respondents also said "manufacturer's name" (8%), "regular price/sale price" (4%).

Question: Which retail stores' advertising do you like best and why do you prefer it?

	Percent Like Best	
Store Type	1981	1973
Department	33%	28%
Discount	25	21
PLGM	19	18
Specialty	4	2
Chain Drug	3	2
Home Center	2	-
Other	-	*2
No Opinion	14	27
	100%	100%

* In 1973 Study, "other" included Home Center and Catalog Showroom

Reasons For Preference	All Stores	Dep't	Disc	PLGM	Spclty	Chain Drug	Home Center
Graphically Appealing	32%	47%	23%	15%	52%	17%	21%
Informative	13	12	10	14	14	23	18
Advertise Many Items	12	9	11	18	8	13	15
Sales Excitement	10	4	18	13	8	9	17
Easy to Read	9	7	12	11	4	8	6
Good Frequency	8	6	9	11	2	9	9
Catalog/ Booklets	5	3	8	3	4	-	11
Reliable Information	5	6	2	9	2	8	3
Other	3	3	5	-	2	9	-
Just Prefer It	3	3	2	6	4	4	-
	100%	100%	100%	100%	100%	100%	100%

NOTE: In the 1973 Study, only 13% of the respondents said Discount store advertising was "graphically appealing"

Question: Which stores' advertising do you like least, and why?

Store Type	Percent Like Least 1981	1973
Discount	25%	29%
Department	8	7
PLGM	8	4
Specialty	6	4
Chain Drug	6	*
Home Center	6	2
Other	-	5
No Opinion	41	51
	100%	100%

* Included in "other" category in 1973 Study

Reasons For Liking Least	All Stores	Disc	Dep't	PLGM	Spclty	Chain Drug	Home Center
Unattractive/ Unappealing	24%	15%	16%	36%	47%	29%	32%
Poor Quality	17	29	1	11	16	9	3
False/ Misleading	17	18	23	18	9	13	17
Too Cluttered	13	12	12	9	10	29	20
See It Infrequently	6	7	4	6	1	4	13
Difficult to Read	5	4	3	7	6	4	5
Features High Priced Merchandise	4	-	20	1	2	-	-
Other	6	9	5	6	4	7	2
Just Don't Like It	8	6	16	6	5	5	8
	100%	100%	100%	100%	100%	100%	100%

Advertising Recall and Action Taken

Question: Do you recall any store's printed advertising that that prompted you to go to the store for an advertised item?

	Total		1981 Study			
	1981	1973	N E	M W	F W	S E
Recalled one or more ads	85%	71%	85%	83%	90%	81%
Did Not Recall	15	29	15	17	10	19
	100%	100%	100%	100%	100%	100%

Question: What is the name of the store whose advertising you recall?

	Total		1981 Study			
Store Type	1981	1973	N E	M W	F W	S E
Discount	55%	68%	39%	62%	43%	78%
Department	42	41	63	35	39	30
PLGM	38	36	47	45	38	23
Specialty	27	27	13	21	42	31
*Chain Drug	11	-	13	12	11	7
*Home Center	12	-	4	11	11	22
	**	**	**	**	**	**

* Not included in the 1973 Study
** Totals more than 100% due to multiple answers

Question: Did you buy each of the items that you went to the store to purchase as a result of seeing it in the store's advertising?

	Total							
	1981	1973	Chain Drug	PLGM	Home Center	Disc	Dep't	Spclty
Yes	86%	79%	95%	90%	90%	86%	85%	81%
No	14	21	5	10	10	14	15	19
	100%	100%	100%	100%	100%	100%	100%	100%

Question: If you did not purchase the item, what was your reason for not purchasing it?

	Total							
	1981	1973	Disc	Chain Drug	PLGM	Spclty	Home Center	Dep't
Item Not In Stock	24%	36%	45%	45%	15%	14%	12%	10%
Poor Selection	20	-	10	22	29	20	13	29
Not What Expected	15	12	14	11	19	16	25	9
Poor Quality	12	14	15	-	13	14	12	9
Too Expensive	11	-	-	-	4	18	25	28
Ad Misleading	7	10	10	11	8	5	-	3
All Other	11	28	6	11	12	13	13	12
	100%	100%	100%	100%	100%	100%	100%	100%

Qualitative Ratings on Specific Marketing Factors

Respondents were asked to give their evaluation of each store type by rating them on 7 specific marketing factors on an excellent to poor basis. The specific factors rated are: Pricing, Quality, Employee Helpfulness, Variety of Merchandise, Selection of Merchandise, Advertising and Store Location.

Weighted Index Ratings For All Four Regions By Store Type

	Discount		Department		PLGM		Home Center		Chain Drug	
Factors	'81	'73	'81	'73	'81	'73	'81	'73	'81	'73
Pricing	270	251	231	268	295	312	203	235	231	NA
Quality	240	204	380	383	337	351	248	196	247	NA
Employee Helpfulness	197	173	292	315	289	312	203	162	217	NA
Variety of Merchandise	281	262	347	379	344	358	275	198	247	NA
Selection of Merchandise	262	245	337	362	333	337	253	185	246	NA
Advertising	263	251	330	327	326	320	239	176	240	NA
Store Location	276	283	356	370	343	354	255	202	280	NA

Weighted rating basis - Excellent (5), Very Good (4), Good (3), Fair (2), Poor (1)

Actual Ratings of Marketing Factors by Store Type

Pricing

Store	Excellent	Very Good	Good	Fair	Poor	No Opinion	*Weighted Rating
Discount	8%	26%	32%	13%	4%	17%	270
Department	3	10	32	31	18	6	231
PLGM	6	26	41	17	4	6	295
Home Center	2	12	35	18	4	30	203
Chain Drug	5	18	34	14	4	25	231

Weighted rating basis - Excellent (5), Very Good (4), Good (3), Fair (2), Poor (1)

Quality

Discount	4%	18%	33%	21%	7%	17%	240
Department	34	36	19	4	1	6	380
PLGM	13	37	36	7	2	5	337
Home Center	9	24	30	8	1	28	248
Chain Drug	7	24	32	9	2	26	247

Employee Helpfulness

Discount	2%	9%	27%	27%	16%	19%	197
Department	13	23	31	18	6	9	292
PLGM	8	21	41	18	6	6	289
Home Center	4	14	29	17	6	30	203
Chain Drug	6	14	29	20	4	27	217

Variety of Merchandise

Discount	8%	27%	30%	13%	4%	18%	281
Department	24	34	25	7	2	8	347
PLGM	18	35	32	8	2	5	344
Home Center	12	24	26	8	1	29	275
Chain Drug	8	24	29	11	2	26	247

Selection of Merchandise

Discount	7%	23%	33%	16%	4%	17%	262
Department	19	35	28	8	2	8	337
PLGM	14	35	33	11	2	5	333
Home Center	9	22	30	9	12	28	253
Chain Drug	7	22	33	11	2	25	246

Advertising

Store	Excellent	Very Good	Good	Fair	Poor	No Opinion	*Weighted Rating
Discount	9%	20%	34%	15%	6%	16%	263
Department	21	31	28	9	2	9	330
PLGM	14	30	37	11	3	5	326
Home Center	9	18	30	15	2	26	239
Chain Drug	8	17	35	12	3	25	240

Weighted rating basis - Excellent (5), Very Good (4), Good (3), Fair (2), Poor (1)

Store Location

Discount	13%	18%	30%	17%	15%	7%	276
Department	30	25	26	11	6	2	356
PLGM	23	25	33	12	5	2	343
Home Center	13	16	26	18	12	15	255
Chain Drug	21	18	24	11	9	17	280

The Following Series of Questions Were Asked of Those Respondents Who Live in a House

Question: In which of these house repair or home decorating activities do you and/or your husband, wife participate?

	% Total Families Participating		1981 Study Who Participates			
Activity	1981	*1973	Wife	Husband	Both	Not Married
Painting	78%	76%	17%	22%	44%	17%
Carpentry	55	47	7	58	20	15
Wallpapering	51	32	30	23	33	14
Plumbing	49	49	4	74	7	14
Cement Work	37	28	1	25	4	7
Electrical Work	36	39	6	72	11	11

* 1973 NMRI/DuPont Study - Personal Activities and Related Purchase of Self-Service General Merchandise Shoppers

Painting Purchases

Question: Where do you purchase the majority of your paint for home use?

Store	% Responding
Specialty	38%
PLGM	30
Discount	17
Home Center	15
	100%

Reason For Purchasing At Store Indicated	All Stores	Specialty	PLGM	Discount	Home Center
Quality	33%	32%	49%	18%	18%
Price	28	24	29	34	32
Location	16	19	4	25	23
Variety	11	10	8	7	20
Preferred Brand	4	5	3	4	2
Service	3	4	1	5	-
Shopping Ease	2	2	1	2	4
Loyalty	1	2	-	3	-
Credit	1	1	5	1	-
Employee Advice	1	1	-	1	1
	100%	100%	100%	100%	100%

Question: When you or your husband do your own painting, do you only do the interior, the exterior, or do you do both?

	% Responding	
	1981	1973
Interior and Exterior	61%	60%
Interior Only	38	38
Exterior Only	1	2
	100%	100%

Question: When you buy paint for exterior use do you generally purchase a national or a store brand?

Purchase	% Responding
National Brand	57%
Store Brand	43
	100%

Question: When you buy paint for interior use do you generally purchase a national or a store brand?

Purchase	%
National Brand	52%
Store Brand	48
	100%

Question: Do you always, most of the time, seldom or never wait for the paint you want to go on sale before purchasing?

	%
Always Wait	23%
Most of the Time Wait	27
Seldom Wait	22
Never Wait	28
	100%

Question: When you purchase paint for a big job, do you usually also purchase paint accessories (brushes, rollers, thinners, drop clothes) at the same store in which you purchase the paint?

	%
Yes	78%
No	22
	100%

Question: If you don't, why don't you?

	Total	N E	M W	F W	S E
Usually on Hand	60%	77%	37%	42%	86%
Cheaper Elsewhere	22	7	34	42	8
Purchase at Discount	5	3	12	-	-
Purchase at other store	3	-	10	-	-
No Answer	10	13	7	16	6
	100%	100%	100%	100%	100%

Question asked of those who said they make the majority of their paint purchases in a store other than a Discount store.

Question: What is your principal reason for not making the majority of your paint purchases in a Discount Department store?

	Total	N E	M W	F W	S E
Buy Better Quality	28%	20%	28%	34%	34%
Brand Preference	18	16	20	11	29
Store Preference	13	15	6	18	15
Questionable Quality	11	16	19	5	2
Get Better Price	7	8	2	13	4
Location/Convenience	7	6	4	10	7
Get Better Selection	5	4	6	8	2
No Particular Reason	5	5	12	1	1
No Answer	6	10	3	-	6
	100%	100%	100%	100%	100%

Carpentry Purchases

Question: Where do you make the majority of your carpentry purchases for work you do on your home?

Store	% Responding
Home Center	58%
Specialty	31
Discount	6
PLGM	5
	100%

Reason For Purchasing At Store Indicated	All Stores	Home Center	Specialty	Discount	PLGM
Price	31%	30%	29%	63%	14%
Location	30	30	33	26	14
Variety	20	22	15	11	9
Quality	11	10	10	-	45
Loyalty	1	1	2	-	-
Shopping Ease	3	3	3	-	9
Service	2	2	4	-	9
Preferred Brand	1	2	1	-	-
Parking	1	-	-	-	-
Employee Advice	1	-	3	-	-
	100%	100%	100%	100%	100%

Wallpapering Purchases

Question: Where do you make the majority of your wallpapering purchases for work you do in your home?

Store	% Responding
Specialty	71%
Home Center	14
PLGM	10
Discount	4
Department	1
	100%

Reason For Purchasing At Store Indicated	All Stores	Specialty	Home Center	PLGM	Discount	Dep't
Price	32%	31%	28%	30%	64%	50%
Variety	30	31	38	22	12	-
Quality	16	15	12	35	6	50
Location	15	17	17	-	12	-
Service	2	3	-	-	6	-
Preferred Brand	1	1	1	-	-	-
Shopping Ease	1	-	2	5	-	-
Credit	1	-	-	4	-	-
Loyalty	1	2	-	2	-	-
Employee Advice	1	-	2	2	-	-
	100%	100%	100%	100%	100%	100%

Plumbing Purchases

Question: Where do you make the majority of your plumbing repair purchases for the home?

Store	% Responding
Home Center	50%
Specialty	38
PLGM	8
Discount	4
	100%

Plumbing Purchases

Reason For Purchasing At Store Indicated	All Stores	Home Center	Specialty	PLGM	Discount
Location	31%	34%	31%	12%	29%
Price	24	24	20	32	64
Variety	19	24	16	12	7
Quality	16	13	16	38	-
Shopping Ease	3	3	3	-	-
Employee Advice	3	1	5	-	-
Service	2	-	5	-	-
Preferred Brand	1	1	1	3	-
Loyalty	1	-	3	-	-
Credit	-	-	-	3	-
	100%	100%	100%	100%	100%

Cement Work Purchases

Question: Where do you make the majority of your purchases for cement work you do for your home?

Store	% Responding
Home Center	50%
Specialty	43
Discount	7
	100%

Reason For Purchasing At Store Indicated	All Stores	Home Center	Specialty	Discount
Location	38%	39%	39%	27%
Price	32	27	33	64
Variety	11	16	6	9
Quality	8	9	9	-
Shopping Ease	4	5	2	-
Service	3	-	6	-
Preferred Brand	1	1	1	-
Credit	1	2	1	-
Loyalty	1	1	1	-
Employee Advice	1	-	2	-
	100%	100%	100%	100%

Electrical Work Purchases

Question: Where do you make the majority of your electrical work purchases for work you do in your home?

Store	% Responding
Home Center	49%
Specialty	27
PLGM	14
Discount	10
	100%

Reason For Purchasing At Store Indicated	All Stores	Home Center	Specialty	PLGM	Discount
Location	34%	34%	39%	16%	46%
Price	25	27	22	9	42
Variety	19	23	12	22	8
Quality	12	9	13	31	-
Shopping Ease	3	5	1	3	4
Service	2	1	6	3	-
Loyalty	2	-	4	3	-
Preferred Brand	1	-	-	4	-
Credit/Adjustment	1	-	-	9	-
Employee Advice	1	1	3	-	-
	100%	100%	100%	100%	100%

Question: Do you or other members of your family perform any maintenance on your automobile?

Type of Work Done	% Responding 1981	1972
Washing	85%	93%
Change the Oil	82	70
Add or Change Anti-freeze	80	76
Exterior Wax/Polish	79	82
Minor Mechanical Repairs	73	74
Engine Tuneup	50	59
Lubrication	49	44
Add Oil Additives	42	*
Add Gas Additives	41	*
Major Mechanical Repairs	29	-

* In 1972 these two categories were combined. The combined result was 54%. In 1978 the combined total was 51%.

Automobile Maintenance Purchases

Question: Where do you make the majority of your automobile maintenance purchases for work you do on your automobile?

Store	% Responding
Specialty	51%
Discount	30
PLGM	11
Home Center	6
Chain Drug	1
Department	1
	100%

Reason For Purchasing At Store Indicated	All Stores	Specialty	Discount	PLGM	Home Center	Chain Drug	Dep't
Price	42%	34%	65%	21%	41%	25%	25%
Location	26	33	18	16	27	62	-
Variety	11	9	10	16	16	13	50
Quality	10	9	2	31		-	25
Preferred Brand	3	5	1	2	2	-	-
Service	2	3	2	-	-	-	-
Shopping Ease	2	2	2	2	-	-	-
Credit	2	1	-	10	-	-	-
Loyalty	2	3	-	2	2	-	-
Employee Advice	-	1	-	-	-	-	-
	100%	100%	100%	100%	100%	100%	100%

DEMOGRAPHICS

Sex	Total	N E	M W	F W	S E
Female	61%	59%	53%	64%	67%
Male	39	41	47	36	33
	100%	100%	100%	100%	100%

DEMOGRAPHICS

Age Group	Total	N E	M W	F W	S E
18 to 24	20%	9%	27%	25%	20%
25 to 34	31	22	38	26	39
35 to 44	16	20	14	12	18
45 to 54	13	18	13	13	8
55 to 64	12	19	6	12	12
65 and over	5	11	1	6	3
No Answer	3	1	1	6	-
	100%	100%	100%	100%	100%
Marital Status					
Married	61%	74%	58%	55%	55%
Single	27	15	33	32	28
Divorced	8	7	9	7	12
Widowed	4	4	-	6	5
	100%	100%	100%	100%	100%
Length of Time Married					
1 to 3 years	15%	12%	13%	19%	18%
4 to 15 years	35	25	48	33	39
16 to 25 years	17	18	13	16	20
26 to 40 years	25	36	18	25	19
41 years and longer	5	9	2	5	2
No Answer	3	-	6	2	2
	100%	100%	100%	100%	100%
Place of Residence					
House	69%	73%	67%	72%	65%
Apartment	29	26	31	24	34
Mobile Home	2	1	2	4	1
	100%	100%	100%	100%	100%
Number of Children Under 18 Living at Home					
None	43%	60%	33%	58%	35%
One	25	17	30	17	29
Two	20	18	21	12	24
Three	7	4	11	5	8
Four or more	3	-	5	2	4
No Answer	2	1	-	6	-
	100%	100%	100%	100%	100%

Total Family Income	Total	N E	M W	F W	S E
Under $3,000	1%	1%	2%	2%	1%
$3,000 to $4,999	3	3	2	3	4
$5,000 to $7,999	5	4	6	5	4
$8,000 to $9,999	5	4	6	3	5
$10,000 to $14,999	11	12	14	11	9
$15,000 to $19,999	11	10	15	10	11
$20,000 to $24,999	16	18	18	15	12
$25,000 to $49,999	28	32	27	31	23
$50,000 and over	6	4	5	10	4
No Answer	14	12	5	10	27
	100%	100%	100%	100%	100%
Occupation of Chief Wage Earner					
White Collar	43%	39%	36%	53%	44%
Blue Collar	28	28	28	24	30
Executive/Professional	12	16	16	10	8
Retired	8	14	4	6	11
Military	1	-	1	1	1
Student	2	-	5	1	1
Unemployed	2	1	3	1	2
No Answer	4	2	7	4	3
	100%	100%	100%	100%	100%
Education of Respondent					
8th grade or less	2%	6%	-%	1%	1%
9th grade	1	1	-	1	-
10th grade	1	2	3	1	2
11th grade	3	4	3	5	3
12th grade	36	45	36	35	26
Some College	30	20	31	37	31
College Graduate	19	16	16	14	29
Post Graduate	8	6	11	5	7
No Answer	-	-	-	1	1
	100%	100%	100%	100%	100%